



“Meet your new partner”

Prepared by Jason Hier, Roelto Ltd

Institute of Civil Engineering, The Delivery Club Workshop – 13<sup>th</sup> November 2017

# Agenda

- The Delivery Club Workshop, ICE 13<sup>th</sup> November 2017
- Some Common Issues
- Glue and Fuel
- Visual (Data) Collaboration



# The Delivery Club Workshop

The workshop was held at the Institute of Civil Engineering (ICE) to look at the future of project management and the closely associated programme, portfolio and change management as well as PMO support from the perspective of the next generation and what is required to change to meet their needs.

There were 3 presentations:

**Dave Millner, Executive Consulting Partner, IBM Workforce Science and “HR Futurist”** – Dave will talk about the digital future of work trends that will emerge and evolve over the next 10 years, the impact it will have on how leaders and managers will need to behave and what the impact will be in the workforce in terms of behaviour and expectations. Dave also has a sound understanding of the challenges faced by today's delivery leaders.

**Rob Leslie-Carter, Director, Arup** – share some of the key insights from the recently published Future of Project Management report which was a partnership and collaboration between Arup, APM and The Bartlett School of Construction and Project Management at UCL, as well as crowd-sourced inputs from the global project management community, examining the global drivers shaping the long term future of project management and their implications.

**Jason Hier, Director Roelto** – an expert on data visualisation using SharpCloud and collaboration (ISO 44001: Institute for Collaborative Working – ICW) in complex portfolio and project contexts, working with multiple major construction, engineering, transport, energy and pharmaceutical business to help improve project delivery and portfolio visualisation. The challenge of working with multiple project partners is ever increasing and Jason shares some insight into some of the issues and how taking a visual collaboration approach can help you address these issues.

# Common Issues found on 3 projects 2015 - 2017

| Sector Issues<br>(Project Reporting) | Energy   | INGO  | Transport   |
|--------------------------------------|--|---|---|
| <b>Organisation</b>                  | <ul style="list-style-type: none"> <li>• Corporation – Shareholders</li> <li>• Contractual</li> <li>• <b>Mature business partners – inflexible</b></li> </ul>          | <ul style="list-style-type: none"> <li>• Federation - autonomy</li> <li>• <b>Multiple business partners – international</b></li> <li>• Lack of governance</li> <li>• Donors - compliance</li> </ul> | <ul style="list-style-type: none"> <li>• Public – citizens</li> <li>• Contractual</li> <li>• <b>Mature business partners – inflexible</b></li> </ul>                                      |
| <b>People</b>                        | <ul style="list-style-type: none"> <li>• <b>90% of work done by others</b></li> <li>• Remote/virtual working</li> <li>• Creating reports using spreadsheets</li> </ul> | <ul style="list-style-type: none"> <li>• High churn rate</li> <li>• No formal training</li> <li>• <b>80 – 90 % work completed by others</b></li> <li>• Virtual/remote</li> </ul>                    | <ul style="list-style-type: none"> <li>• <b>&gt;80% of work done by contractors/consultants</b></li> <li>• Managing project by spreadsheets</li> <li>• Multiple site locations</li> </ul> |
| <b>Process</b>                       | <ul style="list-style-type: none"> <li>• Defined but project specific</li> <li>• Multiple &amp; complex</li> <li>• <b>Manual reporting and aggregation</b></li> </ul>  | <ul style="list-style-type: none"> <li>• Not standardised</li> <li>• Just do it, any which way you can</li> <li>• <b>Paper, spreadsheet reporting</b></li> </ul>                                    | <ul style="list-style-type: none"> <li>• Some standardised processes</li> <li>• Not agile</li> <li>• <b>Complex spreadsheets, manually completed</b></li> </ul>                           |
| <b>Technology</b>                    | <ul style="list-style-type: none"> <li>• <b>Multiple data structures but inconsistent</b></li> <li>• Multiple systems in place -</li> </ul>                            | <ul style="list-style-type: none"> <li>• Disparate /no core systems</li> <li>• Lack of integration</li> <li>• <b>No data governance</b></li> </ul>  | <ul style="list-style-type: none"> <li>• <b>Limited project data governance</b></li> <li>• Key systems supported by productivity tools</li> </ul>   |

# ...and the 7 deadly sins of “loss”..

1. *Defects*

*Wrong or Incomplete Information*

2. *Waiting*

*For Data & other people to do their bit*

3. *Checking*

*“Quality Control” - duplication of effort.*

4. *Rework*

*Correcting & Altering*

5. *Stack*

*Piles of files (paper and digital), can't find anything!*

6. *Over Processing*

*Doing more than is really necessary*

7. *Movement*

*Of data, documents and / or people*

*All of these root cause issues can cost money, complexity and increased time*

# Collaboration (glue) and Data (fuel) – part of the solution?



Collaboration is the glue that binds organisations, people, processes and technology together



Data is the fuel that enables organisations, people, processes and technology to make informed decisions and move forward



## Visual Collaboration:

**Data governance and visualisation** – quality data that can be shared and visualised by organisations and people across multiple tools/systems

Use clean fuel

Data governance  
and visualisation  
is key.



Data governance and integration has to be a project task, so quality data can be shared and visualised quickly and easily using visualisation tools such as SharpCloud



## Visual Collaboration:

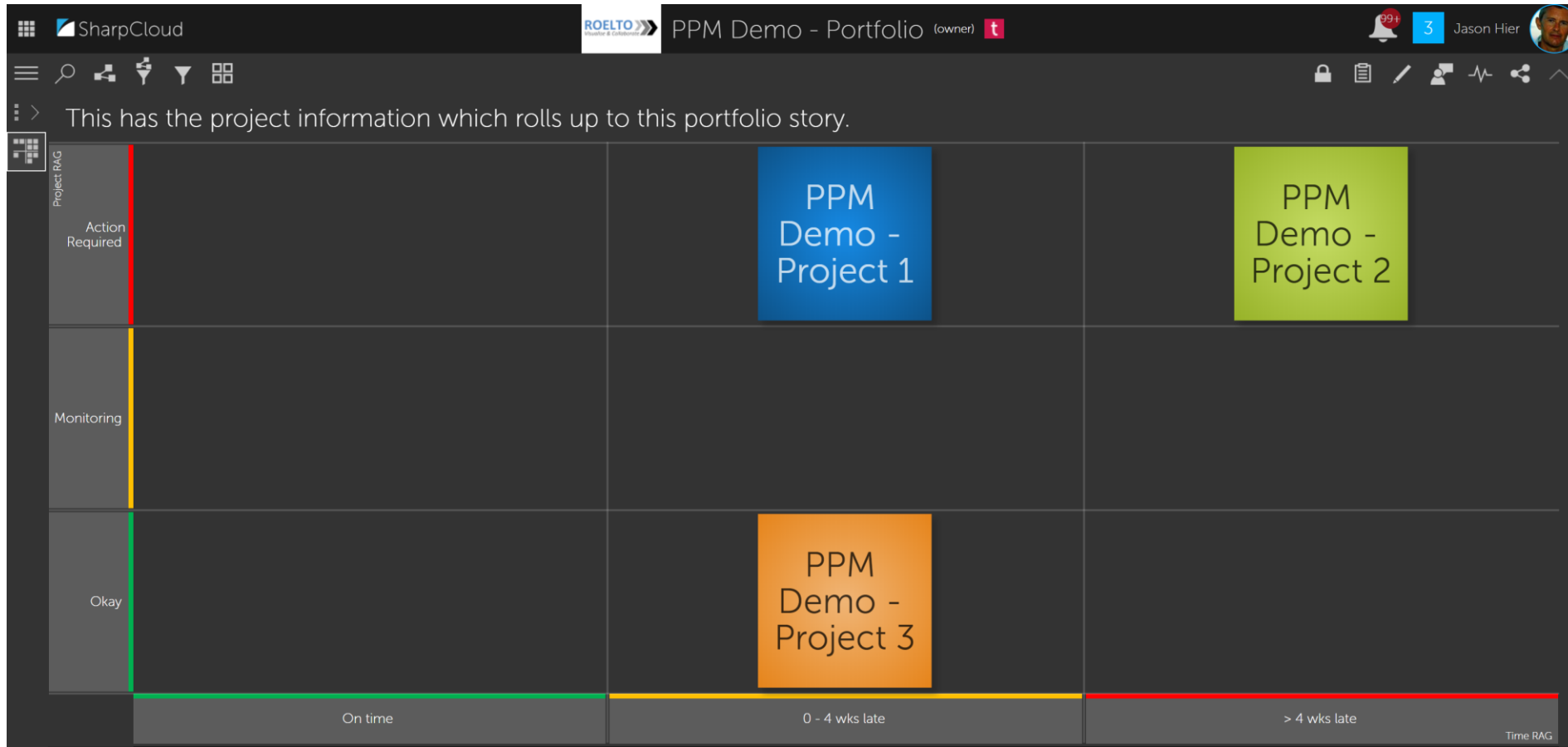
What Questions are we trying to answer – “Start with the end in mind” and connect

Apply 80/20 Principle

20% of the organisations, people, processes & data provides 80% of answers

Create the correct connections to facilitate data, information and knowledge flow





Integrated Project Portfolio Management – see all your projects at a portfolio level

SharpCloud ROELTO PPM Demo - Project 1 (owner) t 99+ 3 Jason Hier

This shows the relationships between Milestones, Risks and Actions Total value for Costs: £3.25M

Last updated by Jason Hier - 12:50:14

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graph BT; A1[Action 1] --> R1[Risks 1]; A2[Action 2] --> R1; R1 --> M1[Milestones 1]
```

Milestones 1

Risks 1

Action 1

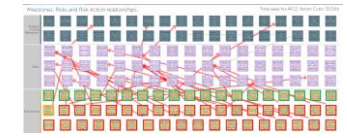
Action 2

Milestones

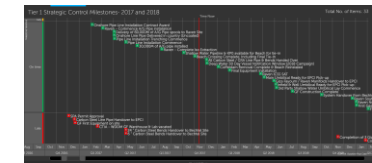
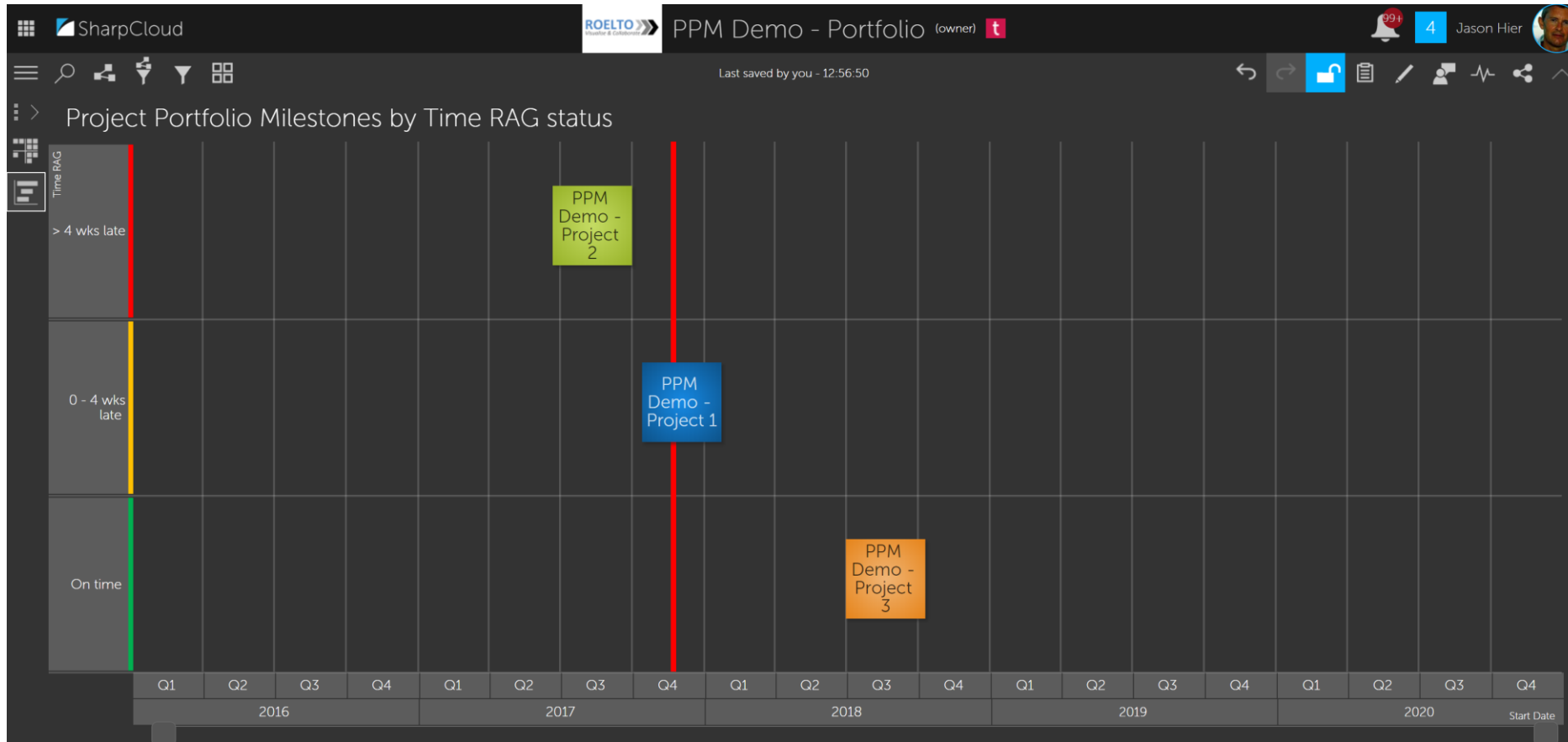
Risks

Actions

None



# Relationships between Milestones, Risks and Actions, including Costs



Integrated milestones from different projects

# Points for Discussion

- What do we need to do to enable a more collaborative working relationship?
- Does data governance and integration need to be recognised as a standard project activity?
- What project data do we need to capture, visualise and share?

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Please feel free to contact me for your complimentary ½ day Project and Portfolio Management workshop and free 10 day subscription to SharpCloud. Reference “The Delivery Club ICE2017”